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**Organizational development may not fit in all school settings, but it is worthy of careful consideration.**

# Organization development training: a case study

by Ronald G. Davison and Paul D. Longhofer



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The bureaucratic structure of a large public school system can be very protective of personnel serving at any level of the hierarchy. For the principal assuming a new building assignment, the recognition that he or she carries a mandate to affect necessary change can be a tremendous source of reassurance (Harper, 1965). With the mantle of authority vested in the position, one can visualize a capacity to make dramatic short-term changes, especially if the affected faculty perceives its new administrator as coming on board to turn things around in a major kind of way.

The new principal must, however, consider the nature and complexity of the desired change and the strategy and supporting tactics that will be required to carry it off successfully. One has the choice, therefore, of relying on established bureaucratic protocols to affect change, or perhaps risking a totally new in-school management structure that might increase each faculty member's stake in the change process. This article describes an attempt to apply the second option using a body of applied behavioral science knowledge called organization development (OD). It is offered with all the caveats and perceived strengths that emerged in this one application. Our expectation is that you will consider its suitability as an alternative to the more traditional school management approaches.

## The School Context

In the situation described here, the principal-designate was moving into a junior high school that had experienced all of the negative dimensions commonly associated with school desegregation. Let us briefly review those environmental circumstances:

A student body of 2,000 was primarily composed of youngsters emerging from white, working-class homes who brought an array of racist sentiments to school with them. The arrival of "bused-in" blacks three years earlier had increased the number of disciplinary infractions to the point that the school had a district-wide reputation of poor student control.

Teacher attitudes were generally perceived as being defeatist by central administration. Most faculty members were viewed as having surrendered on the prospect of turning the present situation around. The other side of the coin was a pervasive feeling among faculty that "downtown" (i.e., central administration) was impotent in terms of its capacity to offer a workable solution to the school's problems.

Administrative leadership in the building was essentially trapped by the school's current troubled circumstances. The proposed change in the building principalship was not attributable to dissatisfaction with the individual in charge, but arose from a conviction by district policy-makers that only a new person could effectively escape the problems of the past.

## The Emergence of a School Management Strategy

With the process of developing an appropriate training/change model and the selection of a new principal moving simultaneously, the first task of the university-based training director and the principal-designate was to ferret out their philosophical differences to ensure something like congruence on the most workable *change*

strategy. It was mutually agreed that the most effective school renewal process would acknowledge that a faculty can be trained to collaboratively manage the culture of their school in a manner that supports goal attainment.

Literature provided by university training staff suggested that the application of organization development principles might be responsive to the human needs of faculty, as well as the productivity issues facing the school. Beckhard (1969), an early worker in OD theory, describes it as an effort (1) planned, (2) organization-wide and (3) managed by the organizational leader, to (4) increase organizational effectiveness and morale through (5) planned interventions into the organization's processes using behavioral science and management knowledge. Although the techniques used in an OD training/change effort may vary considerably, they usually proceed from two assumptions. First, employees are human beings, not just component parts of a bureaucratic hierarchy to be manipulated to make the machine run more efficiently. Secondly, this concern for people does not have to conflict with the administrator's concern for productivity, and that only as these concerns are met simultaneously will an organization make the fullest use of its resources.

OD theory assumes that change must be initiated within the context of the existing work group which is viewed as having a capacity to grow through learning how to improve their work environment. OD accepts as inevitable, conflicts between faculty members and between faculty members and administration, but advocates openly confronting these conflicts using problem-solving strategies. OD additionally recognizes the reality experienced in too many staff development efforts conducted in the public schools—that is, our tendency to gear up for instructional innovation and change without addressing the environmental context in which the change will be attempted (Newell, 1973).

The risk of engaging in exactly the same pattern was especially germane in this situation, a school setting where the prevailing climate supported a reactive rather than a proactive response to problems. The success of OD in this building would therefore turn on the extent to which faculty perceived the new principal as being honestly committed to working with and through people to attain change; coupled with their own willingness to accept new responsibilities in a program that would demand increased collaboration in response to mutually-determined goals.

### The Design of the OD Training Component

Initial planning activities involving faculty representatives (i.e., department coordinators) were limited to three half-day sessions during the last month of school, and generally served the following purposes:

- Identified the kinds of change initiatives that would be sanctioned or perhaps strongly resisted by various faculty groups;
- Provided contextual information about the school that plugged knowledge gaps vital to the planning of a start-up training experience;
- Generated support for the administration of opinionnaires to faculty and students that would provide information for later analysis during the initial phase of training.'

- Helped the training staff determine faculty expectations for a training activity, an input which strengthened its overall instructional design;
- Isolated the issues that would be major content concerns during a training activity (e.g., problems related to school size, student control, dysfunctional faculty behavior, student attitudes).

Pre-planning with coordinators isolated the issue areas of substantive concern to faculty, communicated the intentions of the training staff and the new principal and substantially determined the content parameters for startup training.

Training staff and principal concluded their own planning activities with a workshop design that would ideally attain the following short-term objectives:

- (1) Initiate collaborative work activity among faculty members in pursuit of new goals and objectives.
- (2) Provide skill training that would help faculty function more effectively as members of problem-solving groups.
- (3) Assist the principal in developing and implementing a management structure that would provide a capacity for flexible, organizational problem solving.

### The Initial Workshop Experience

Organization development as a training/change vehicle was selected in a belief that the problems of the school pointed to the need for a new management strategy. That message was shared with all faculty and non-professional staff when they were asked (but not required) to attend a ten-day workshop scheduled immediately before the start of school. Additionally, each would be involved in formal reassembly sessions on four occasions during the coming school year. Modest stipends would be paid for workshop attendance, with reassembly days to be conducted on a released-time basis.

**Phase 1: Establishing Faculty Ownership:** The opening session saw 80 faculty and non-professional staff arrive for participation. Twenty faculty members chose not to attend or simply were unable to attend. Discord and confusion on the part of some participants was evident on that first day, much of it related to uncertainty as to the workshop's purposes. Those anxiety levels remained fairly high until the end of the second day when the faculty decided to do some testing. If OD meant they were to be democratically involved in the change process, then they seemed to think that they might as well get started on the workshop format. Participants proposed a number of changes in both the time structure and the daily work schedule. After some *negotiation* with training staff, their recommendations were officially incorporated into a revised activities schedule. Those negotiated changes included the establishment of a "rules committee" which enabled participants to report their concerns to training staff (which included the principal) on a daily basis. That procedural alteration substantially reduced feelings of personal insecurity, increased the faculty's sense of ownership in the workshop's purposes and probably boosted the overall productivity of the group.

Student Opinionnaire —QUESTA II, Secondary School Research Program, ETS

Faculty Opinionnaire —School Organizational Development Questionnaire (SODQ), Mullen, D. J. and Goolsby, T. M., Copyright, 1974

**Phase II: Group Development—A Survey-Feedback Approach.** Formal group work began with a survey-feedback exercise utilizing the faculty and student survey data gathered during the spring. Participants were divided into work groups for data analysis purposes with a charge to summarize the inferences emerging from their inspection of the data. Survey feedback led directly to the formation of new work groups whose task was the identification of critical issues as suggested by the data analysis exercise.

**Phase III: Group Development—Isolating and Responding to School Problems.** Training staff speeded up the issue analysis process by the utilization of a home grown problem analysis worksheet (see Figure 1). A special task force composed of one representative from each issue-identification group was created to categorize action proposals related to student needs, with a similar unit handling proposals on faculty-related issues. An abbreviated DELPHI process enabled faculty to set action priorities in each of these areas. With priorities established, participants moved directly to the consideration of a decision-making structure that would have to regulate their back-home response in each priority area?

**Phase IV: The Emerging Management Structure.** The design of a permanent decision-making structure was assigned to an OD committee composed of elected faculty representatives and the building principal. Its recommendation was the creation of a permanent review body, whose eight members would include faculty representatives, a parent representative and the building principal. The primary assignment of the review body would be the processing of issues raised by individual faculty groups, parents or the school's administrative team. The new structure was to be formally known as the Clearing House Committee. A faculty person would serve as committee chairperson, with its other members representing faculty assigned to each of the six

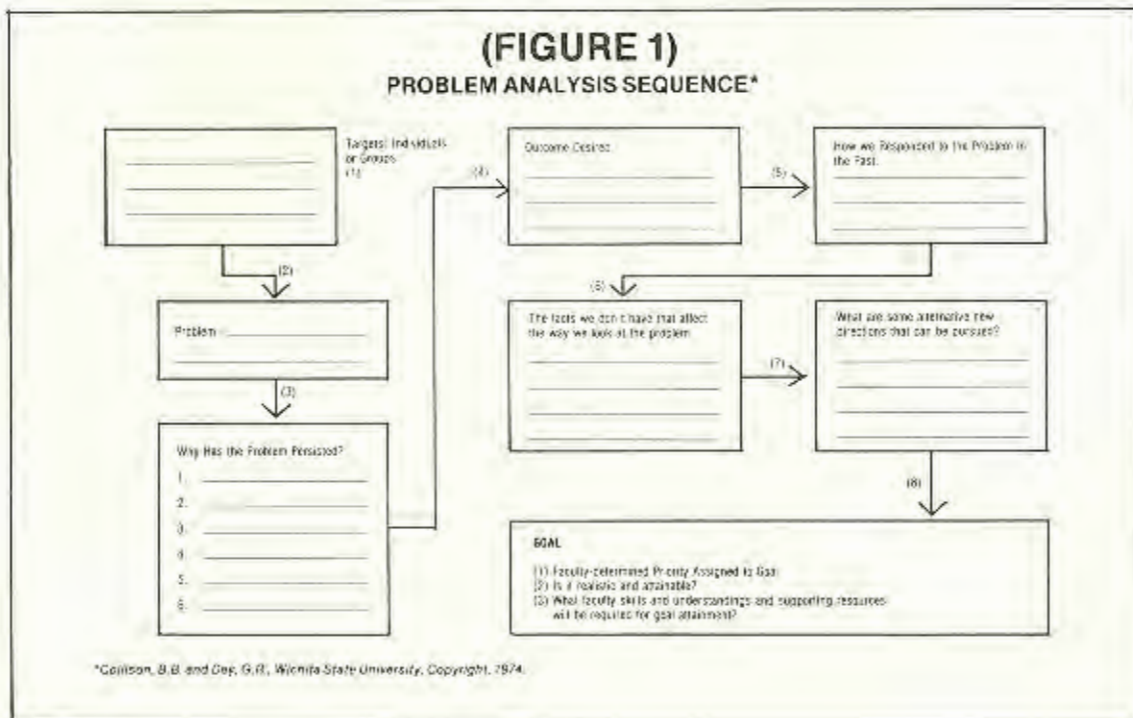
scheduled planning periods. The parent representative was a workshop participant who had long been active in the affairs of the school. The Clearing House would meet weekly to consider items submitted by the aforementioned parties and to identify and assign issues to one or more of the planning period groups for further study. A schematic descriptive of the cycle of management activities directed by the Clearing House is shown in Figure 2. Formal adoption of the review committee structure was ratified by a voice vote of all workshop participants.

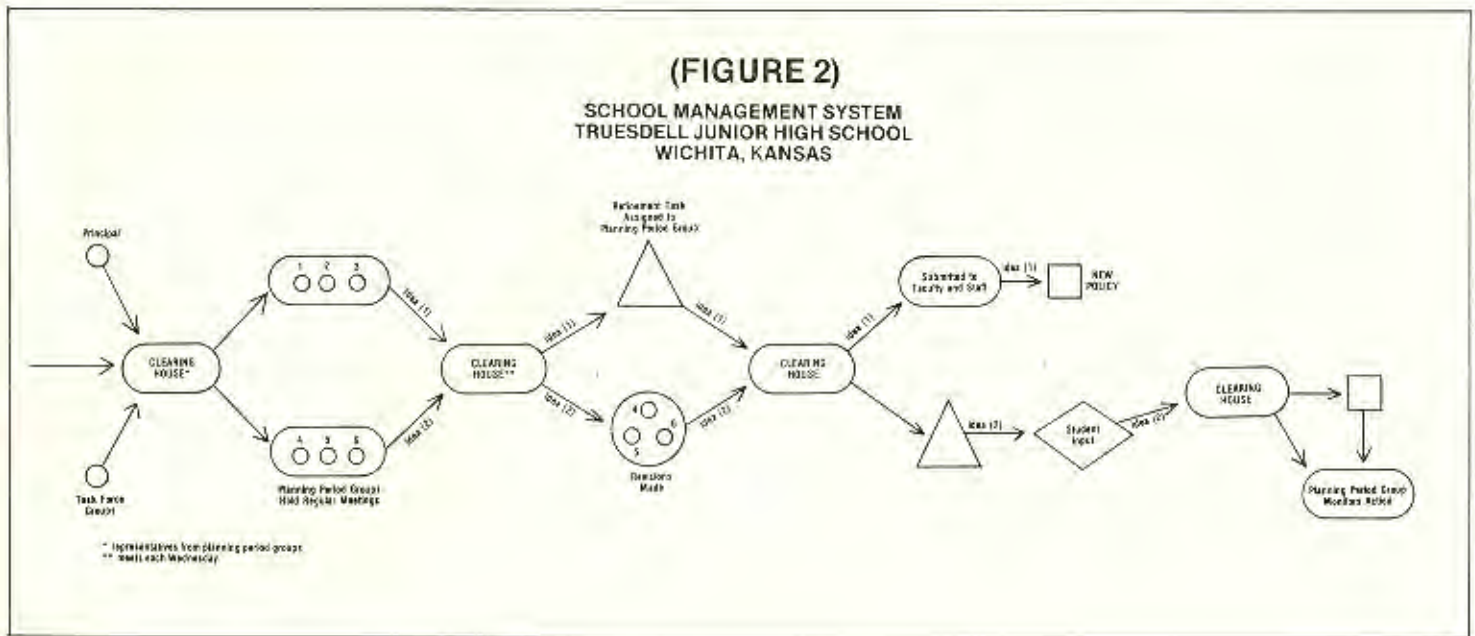
The workshop concluded with participant endorsement of a number of new policies related to student control issues (e.g., a new attendance and tardy policy, procedures for handling disruptions, new hall passing procedures, et cetera). Perhaps the most significant OD gain at this point was the faculty's progress in dealing with the quality of its own interpersonal relationships.<sup>3</sup> Individuals were beginning to see a potential for their own role in the shared management of the school, as well as the obvious advantages of collaborative work activity.

**Back to school: The Continuing Agenda of OD**

The ultimate success of the OD-based training strategy described here must be judged on the extent to which faculty and administration could move successfully from academic concepts to field-based action. Institutionalization of the OD process in response to the day-to-day problems of the school would be the most

2. A major chore for a training staff of five was monitoring interpersonal skill acquisition on a sustained basis since new groups were forming during the course of each training day. In general, brief lecturettes were the primary vehicle for reinforcing the skills essential to the conduct of productive group activity. We would be remiss if we did not share with you our concern about the faculty's overfocus on task accomplishment to the total detriment of skill acquisition in "process" areas. We will say more about that pattern later.
3. A faculty member who critically reviewed this manuscript for the co-authors felt the greatest benefit accruing from the workshop was its therapeutic quality. It was comforting to be able to discuss one's on-the-job concerns with others, and to elicit their support and encouragement.





legitimate measure of meaningful carry-over. Both the principal and the training director had some working hypotheses that were quantitatively and experientially validated via formal evaluation procedures. A modified version of the Survey of Organizations (SOO) questionnaire (Taylor and Bowers, 1972) was administered at the conclusion of the first year of intensive training. Students were also post-tested on their feelings about the school using the Questionnaire for Students, Teachers and Administrators (QUESTA II) developed by the Secondary School Research Program at ETS. A two-year follow-up survey using these instruments has been scheduled for the Spring, 1977 term to assess the impact of our original OD interventions after substantial human and material resource support was withdrawn. Nevertheless, the two-year lapse since formal training ended provides a basis for some "grass roots" perceptions about our operational progress with the benefit of hindsight. Our experience in the real world made us conscious of the need to share a number of the practical problems.

**I. OD must be a planned program:** Careful planning proved to be a *must* if quality work products were to be developed. The principal had to assume primary responsibility for ensuring that planning for essential tasks was completed. Valuable faculty assistance was frequently offered by the same group of concerned people; nevertheless, school administration has had to assume leadership in the initial design and coordination of major activities (e.g., preparing for an OD reassembly session).

**II. OD must be a management-oriented activity:** Every faculty initiative was dutifully processed through the Clearing House Committee at its mid-week sessions. Its actions were reported school-wide via written memoranda on the following day, and as events developed, communication through this new management structure was perceived by faculty as a significant organizational gain.

**III. OD is task-rather than people-oriented training:** The program's instructional format did not emphasize change in individual attitudes and values. A deemphasis

of our needs in that area was partly a concession to the faculty's open dislike of "human relations" training experiences. In addition, OD theory did stress the need for a focus on task accomplishment and the solving of actual work-related problems. A possible effect of adhering to a task rather than a people orientation in the workshop was the reemergence of some unresolved interpersonal problems at the weekly planning period meetings. A general commitment to being an effective task-oriented group member was frequently observed, but so were attitudes and behaviors that were generally disruptive to a planning-period group's consideration of a Clearing House assigned task. Negative behaviors were especially evident among faculty who did not participate in the initial workshop. In response to these lingering problems, the school district provided supplemental training for faculty who wanted to improve the functioning of their assigned planning-period group. Interpersonal skill development and small group management were the major components of this follow-up training activity.

**IV. OD must be a long-term effort:** Faculty came to start-up training with a variety of concerns related to student control. Discipline was their major agenda item and they dealt effectively with it. Less immediate progress was evident in the resolution of instructional- or classroom-management problems. It was apparent to the principal and the training staff that the value-laden issues associated with curricular change in an interracial learning environment would never be meaningfully addressed until problems related to student control were resolved. By mid-year, general satisfaction was being expressed about the way things had been turned around. The building was free from major disruptions and the second reassembly session in January could be fully devoted to a consideration of an alternative learning program that would be implemented during the next school year.<sup>4</sup> Such

4. An alternative learning program for students displaying dysfunctional learning behavior is now fully operational. The school has also implemented another alternative program embracing a "back-to-the-basics" approach and will begin functioning with interdisciplinary teaching teams for seventh-grade instruction during the 1977-78 school year.

a pattern would seem to suggest the importance of attacking the preeminent organizational concerns of faculty before moving into areas that their present circumstances might relegate to the strictly esoteric category.

If we were to be permitted just one generalization about where the OD training/change model had its greatest immediate impact, it would have to be the improvement in two-way communication in the school. Not only was downward communication enhanced by the principal's freer access to the informal structure, but upward communication was also vastly improved by having more channels available for sending messages. We are not suggesting that we have established a free flow of information in the school, but one presently observes more candor and openness when the tougher issues are debated.

**V. OD training relies on collaborative activity in problem-solving groups.** Group work was the major vehicle for issue analysis and resolution. As previously noted, problems did emerge in some planning period sessions when necessary problem-solving expertise was not immediately available. The expertise required for problem resolution probably existed within the context of the entire faculty, but was frequently not available within a given planning-period group. That circumstance could only be corrected at reassembly sessions when individual work tasks were determined by faculty self-selection Clearing House assignment. But between those infrequent meetings, the planning period approach was deemed the only reasonable way to proceed. Volunteerism built around before- or after-school sessions was rejected by faculty since the anticipated levels of non-attendance would preclude serious discussion on issues that required total staff input.

**VI. OD must be managed from the top:** The building principal can and did use OD to facilitate those organizational changes he perceived to be in order. He also had to assume the numerous time-consuming duties that come with a shared decision-making structure. The sheer increase in necessary dialogue has proved arduous at times, but the emergence of "quality" ideas and leadership skills at every level of the employee hierarchy has made that cost seem small. It would be the height of presumption to imply that firm administrative initiatives have singularly accounted for the school's productivity gains. The overwhelming majority of faculty wanted change and endorsed the OD management focus as a very necessary means to that end.

#### Some Tentative Conclusions about One OD Application

It should not be concluded that our school renewal effort has attained all of its objectives. A number of important goals have not been realized and indeed, some organizational refinements are definitely in order if the school is to build upon its initial progress. We still have to move a large number of faculty beyond their concern with student control issues to a more studied consideration of necessary curricular and/or instructional modifications. Progress in that respect was encouraging as evidenced by the emergence of general faculty support for a number of new student-centered programs.

Additionally, the quality of work-group activity must be upgraded. While planning period groups have become the prime vehicle for task accomplishment in the school

the following counter-productive behaviors will have to be continuously addressed if these sessions are to be truly effective.

- The day-to-day dynamics of a large school can alter faculty attitudes very dramatically. The sources of conflict (and all the associated behaviors) are always close to the surface, and faculty and administration must be prepared to deal with them.
- Some faculty have difficulty coping with their punitive instincts. Their fixation with student control issues frequently short-circuits necessary dialogue on the need for instructional change and personal growth.
- A few faculty find it easier to expound on the other person's problems (most notably those of the school administrators, parents and students) rather than their own. Self-assessment is simply not a dimension of their normal on-the-job conduct. This small minority in and of itself is not destructive, but it does tend to hinder collaborative work activity by an invariably negative stance on most problem-solving initiatives.

We suggest these lingering concerns because we do not want other administrators to view OD as a staff renewal panacea. The organization development process is behaviorally complex and will require the principal's tolerance of an occasional attitudinal lapse by some individuals. In our situation, the human and material resources initially available to the school enhanced the principal's capacity to *confront through training* the values and related attitudes that tended to perpetuate change-resistant norms.

Furthermore, this report on one isolated application of OD principles should not be viewed as our blind endorsement of its potential. In fact, we are convinced that there are environmental factors in some schools and school districts which suggest that the utilization of OD strategies to facilitate change would be counter-productive. A thorough review of possible delimiting factors is provided by Schmuck and Runkel (1975), and those research-based conclusions should be very carefully considered. Your attention is also directed to the studies of Schein and Greiner (1977) who argue that OD must become more attuned to bureaucratic realities if it is to prosper as an organizational change strategy.

At a personal level, we do have some reservations about the readiness of all school administrators to function comfortably within an OD framework. Public education is invariably faced with an unrelenting "press" for services by clients with widely differing perceptions of needs. Those often conflicting demands usually result in the building principal's being expected to address ever-changing *instrumental* goals rather than enforcing agreed upon *terminal* goals that could point his or her faculty to specific goal-directed behavior (Sieber, 1969). The extent to which the principal is comfortable responding to the reality of *instructional ambiguity as to purposes* may well determine his or her attraction to OD.

Another concern relates to the readiness of a given administrator to accept the emotional challenges of an OD program. All of us have probably touched base in our professional studies with McGregor's (1970, revised) Theory X and Theory Y dichotomy that proposes that one's management style stems from some deep personal feelings about the way in which an administrator interacts with his superiors, peers and especially his subordinates. The theory X strategy posits a "hard" managerial style

resulting in essentially authoritarian leadership. Theory Y accepts the position that subordinates are motivated by the job satisfactions that come from feelings of achievement, autonomy, self-respect and self-fulfillment. School administrators with a deep rather than a superficial commitment to the "Y" school of thought will strive to satisfy their faculty's need for achievement and self-actualization while they perform the normal work of the school. OD, with its emphasis on openness and trust, leveling, feedback, confronting conflict and risk taking, would obviously be a more logical management fit for them. In the absence of such a commitment, the tendency (even after inservice training that considers these skills and understandings) is to slip back into a Theory X operational mode which may be emotionally less threatening and administratively less demanding.

Staff development programs which prepare building administrators to implement organizational renewal strategies will always be high risk ventures if they do not acknowledge the management philosophy and related expectations held by key school district leadership. Such preparatory experiences may also prove inadequate if they do not recognize and respond to the following commonly observed deficiencies in administrator behavior: denying or avoiding the major sources of conflict; disowning personal responsibility for initiating action or taking a stand on an issue; waiting for someone else to make the first move; resting on early or easy successes in less critical areas instead of pushing on for higher levels of effectiveness; reacting to failure experiences by finding a convenient scape-goat rather than searching for the real causes of failure; expecting to accomplish new levels of effectiveness without learning essential new concepts and skills; taking action on an issue without having clear goals in mind due to an initial lack of data.

### A Final Word

It is always gratifying to be able to point to training initiatives that seem to take a faculty a long way in a relatively short period of time. The authors feel secure enough in their shared judgment about programmatic accomplishment to suggest general satisfaction with the quality of the decisions being made by faculty. And a good part of that quality has been rooted in OD processes that have encouraged two-way dialogue on the critical issues. The staff is now communicating about problems that would have been silently tolerated in the past.

Peer evaluation is a case in point. In one instance, a faculty member who refused to support newly established departmental policies (a resistance pattern he had displayed for a number of years) was officially admonished by his peers. Departmental colleagues demanded his adherence to those policies, and their firmness on the matter prevailed. The individual subsequently requested reassignment to another school. Another faculty person was identified by colleagues as abusing protocols that had been established to deal with some of the less serious disciplinary infractions in the building. It was a simple case of one individual overloading a detention facility with students from his classes. The faculty's response, with principal endorsement, was the reactivation of the Discipline Committee (formed during the initial workshop) to help monitor student assignment patterns to that facility. A formal complaint was directed by the committee to the individual in question, and the

desired response was forthcoming. In the past, both of these incidents would have been exclusively reserved for the principal's consideration; now the climate of the school supports direct faculty intervention in resolving some of the tougher interpersonal hassles.

It is also suggested, in support of the policy-enforcement prerogatives normally assigned to the building principal, that the newly created decision-making and communication structures in no way infringed upon his ability to provide leadership. If anything, these management alterations have strengthened the principal's capacity to help faculty identify necessary new directions and to more efficiently monitor existing programs. The overwhelming majority of faculty had no interest in usurping the formal authority of the principal. He was generally perceived as a source of necessary expertise and direction whose management perspective was welcomed.

A suggestion for the principal who chooses to "OD it" might be to go back and reread Barnard's (1938) classic essay on the "Zone of Indifference." This particular faculty minced no words about the issues that they would not choose to be indifferent to. A more immediate concern, as events have proved, is the need to reduce the number of issues that fall inside the indifference zone. It would seem, for example, that curricular change would be a high priority item, but those are usually the topics that are the easiest to put off. Operationally, the logistics attached to their consideration are always judged by faculty to be insurmountable. We must, therefore, view the unfinished business of OD as creating the management conditions that will support the systematic consideration of the long-term educational issues. Nevertheless, we will argue that our OD management strategy is providing a game plan that will incrementally prepare a faculty group for a larger role in pursuit of general school improvement.

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